

Atty Kruthers, Heather H. (for Public Guardian – Conservator/Petitioner)

Atty Burnside, Leigh W. (for Conservatee)

Petition for Exclusive Authority to Give Consent for Medical Treatment

Age: 86	PUBLIC GUARDIAN , Successor Conservator of the Person and Estate, is Petitioner. PUBLIC GUARDIAN , was appointed successor Conservator of the Person and Estate on 09/18/13 and Letters of Conservatorship were issued on 09/25/13. Petitioner alleges that the conservatee lacks capacity to give informed consent for medical treatment and has dementia. Petitioner requests medical consent powers and dementia powers to administer medications and for placement in a secured perimeter facility.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
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<input checked="" type="checkbox"/> Notice of Hrg		
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<input type="checkbox"/> FTB Notice		

Reviewed by: JF
Reviewed on: 12/16/13
Updates:
Recommendation:
File 1 – Ferguson

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:	
		RONALD MANLEY and KAREN MANLEY , Paternal Uncle and Aunt, are Petitioners.	Continued from 11-14-13	
		Father: DONALD MANLEY (Deceased) Mother: LESLIE SMITH - Personally served 9-17-13		
Cont. from 111413		Paternal Grandfather: Deceased Paternal Grandmother: Deceased	Note: A Settlement Conference Statement was submitted on 12-9-13 by Attorney Aguirre (for Leslie Smith, Mother); however, there is no Settlement Conference scheduled. This hearing is a continued hearing on the guardianship petition filed by Ronald and Karen Manley.	
<input type="checkbox"/>	Aff.Sub.Wit.	Maternal Grandfather: Larry Smith - Mailed service 9-19-13		
<input checked="" type="checkbox"/>	Verified	Maternal Grandmother: Judy Smith - Mailed service 9-19-13		
<input type="checkbox"/>	Inventory	Petitioners state they originally petitioned for guardianship of Noah in 2009 because the father, who was the custodial parent, had passed away, and the mother had a drinking problem. After the petition was filed, the mother began working on the problem, a visitation plan was adopted, and Petitioners suspended their guardianship request. However, the problems have continued, and the mother is not capable of parenting Noah. She does not discipline him, set rules, or hold him accountable for defiant behavior. She buys him cigarettes and allows him to smoke marijuana. She knows he is out of control, but will not do anything because she doesn't want him to have a police record. She prefers to be his friend rather than his parent. Petitioners provide 81 pages of Noah's "tweets" containing references to selling drugs. Petitioners describe an incident from January 2013 when Noah called Petitioners at 1am and stated his mother had kicked him out of the house and could they come get him. Petitioners went there and attempted to speak with her, and observed Noah's room to be filthy with scraps of food, a bong, an empty bottle of Jack Daniels, and smelled of pot. Noah spent a couple of days with Petitioners. Petitioners also state Noah's school attendance is problematic. Petitioners have maintained an extensive log reflecting various inappropriate incidents. Petitioners request that Noah be placed under their custody and control.		
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<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
SEE ADDITIONAL PAGES			Reviewed by: skc Reviewed on: 12-16-13 Updates: Recommendation: File 2 – Manley	

Leslie Smith, Mother, filed objections on 10-24-13. Mother states the petition lacks any specific allegation regarding actions she has taken or neglected to take for the benefit of her son. Further, Petitioners neglect to point out that they have seen her twice in the last four years. The allegations are empty. Ms. Smith states she is a long time school teacher who lives in Fresno and commutes to Lemoore every day without incident. The DUI they refer to occurred **over 22 years ago**. Petitioners also neglect to point out that over the past 2 years they have failed to exercise any significant visitation with Noah despite the agreement that they could do so. With limited knowledge, they nevertheless allege that Noah is out of control. Noah is an incredibly articulate, intelligent young man performing adequately if not well in school. His grades are As and Bs. While he has experimented with alcohol and marijuana, the problem is not excessive, and he is disciplined for this use. Ms. Smith states she does not allow him to consume alcohol or marijuana. Noah continues to see his counselor on a regular basis. Most importantly, Noah has no desire to reside with Petitioners. He is well taken care of and guardianship is neither advisable nor appropriate.

Ms. Smith requests the guardianship action be dismissed in its entirety and that Petitioners be compelled to pay costs, including attorney's fees, in responding to this frivolous motion. Points and Authorities provided.

DSS Social Worker Irma Ramirez filed a report on 11-7-13.

Court Investigator Samantha Henson filed a report on 11-7-13.

(1) First and Final Account and Report of Administrator and (2) Petition for Its Settlement, and (3) Petition for Final Distribution, for (4) Allowance of Compensation to Administrator for Ordinary Services, for Allowance of Compensation to Attorneys for Ordinary and Extraordinary Services, and for (5) Reimbursement of Costs Advanced

DOD: 08/03/09		ERICA DORFMEIER , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting period: 08/03/09 – 10/25/13	1. Beneficiary Jordan O'Neal is a minor. Petitioner request that his share be distributed to her as Custodian under the California Uniform Transfers to Minors Act (CUTMA) (Probate Code § 3900 et seq.). However it is the policy of this Court that distributions to minors be to a blocked account or that a guardianship of the estate be established (in which a blocked account will also be required). The Court will allow the funds to be deposited into a blocked account from a probate matter; however, if there is ever a request to withdraw funds from the blocked account, a Petition under Probate Code §3410 et seq. will need to be filed in a separate case file for the minor or a guardianship of the estate of the minor must be established. Need Order to Deposit Money into Blocked Account or Petition for Guardianship of the Estate of Jordan O'Neal.
Cont. from		Accounting - \$4,173,951.60	<p>Note: A Status hearing will be set as follows:</p> <ul style="list-style-type: none"> Friday, January 17, 2014 at 9:00am in Dept. 303 for filing the Receipt of Funds into Blocked Account or Petition for Guardianship of the Estate <p>Notes: Commentary under CUTMA (§ 3906) states that the amount of property transferred (as measured by its value) must be of such relatively small amount (\$10,000 or less in value) that the lack of Court supervision and the typically stricter investment standards that would apply to a guardianship will not be important. <u>In this case, the minor beneficiary's share is \$513,488.89.</u> Additionally, PrC § 3906(a) states that a personal representative may make a transfer to another adult or trust company as custodian for the benefit of a minor. Petitioner is requesting to transfer the funds to herself as Custodian.</p>
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$4,150,328.84	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$1,789,178.82 (\$1,407,698.16 is cash)	
<input checked="" type="checkbox"/>	Inventory	Adjusted Assets on Hand - \$1,814,178.82 (takes into account the current fair market values of real properties to be used when determining and calculating the distribution of assets due to the fact that the beneficiaries have requested nonprorata distributions of Estate assets)	
<input checked="" type="checkbox"/>	PTC	Administrator - \$45,029.48 (statutory)	
<input checked="" type="checkbox"/>	Not.Cred.	Administrator x/o - \$6,000.00 (for sales of 6 real properties, the purchase of real property by the Estate and the sale of various business equipment)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$45,029.48 (statutory)	
<input checked="" type="checkbox"/>	Aff.Mail w/	Attorney x/o - \$110,996.00 (itemized by date for work related to the winding down of decedent's 2 businesses, the sale of multiple real properties, special administration and bonding, environmental issues involving real property, ancillary proceedings and sales of timeshares in Hawaii, issues with unrecorded Deeds of Trust, sale/auction of business equipment, tax issues, etc.)	
<input type="checkbox"/>	Aff.Pub.	Costs - \$291.33 (amount of unpaid costs advanced. Total costs = \$5,602.75, \$5,311.42 has already been paid)	
<input type="checkbox"/>	Sp.Ntc.	Continued on Page 2	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
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			Reviewed by: JF
			Reviewed on: 12/16/13
			Updates:
			Recommendation:
			File 3 – O'Neal

Reserve - **\$75,000.00** (to cover anticipated additional expenses for preparation of final fiduciary tax returns, miscellaneous expenses in transferring assets and other miscellaneous closing expenses; to cover the costs of any audit and estate taxes, interest and penalties that may be due.) (Petitioner also requests authorization to pay from the reserve any reasonable costs and expenses of the estate without further authorization of the Court and to distribute any remaining reserve in equal shares to the beneficiaries)

Petitioner states the following preliminary distributions have been made:

Erica Dorfmeier - \$4,134.14
David O'Neal - \$4,500.00

Distribution, pursuant to intestate succession, and agreement of the beneficiaries is to:

Erica Dorfmeier - \$338,698.75 cash, real property on Menlo Avenue in Fresno (\$115,000.00), a Chevrolet Silverado (\$10,500.00), a Mercedes Benz (\$23,000.00), a Ford Bronco (\$500.00), and an advance/payable of Erica Dorfmeier with a balance of \$21,656.00), **for a total distribution of \$509,354.75**

David O'Neal - \$273,164.23 cash, real property on Norwich Avenue in Fresno (\$161,824.66), real property in Auberry (\$45,000.00), and a Chevrolet Camaro (\$29,000.00), **for a total distribution of \$508,988.89**

Jordan O'Neal - \$513,488.89 cash (to be distributed to Erica Dorfmeier as custodian under CUTMA (Probate Code § 3413(b))).

Petitioner states that this proposed distribution will equalize all beneficiaries and ensure that each beneficiary has received a 1/3 interest in the Estate, taking into account all prior distributions.

(1) First and Final Account and Report of Administrator and (2) Petition for Its Settlement, and (3) Petition for Final Distribution, for (4) Allowance of Compensation to Administrator for Ordinary Services, for Allowance of Compensation to Attorneys for Ordinary and Extraordinary Services, and for (5) Reimbursement of Costs Advanced

DOD: 08/03/09		ERICA DORFMEIER , Administrator is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 08/03/09 – 10/25/13	<p>2. Beneficiary Jordan O'Neal is a minor. Petitioner request that his share be distributed to her as Custodian under the California Uniform Transfers to Minors Act (CUTMA)(Probate Code § 3900 et seq.). However it is the policy of this Court that distributions to minors be to a blocked account or that a guardianship of the estate be established (in which a blocked account will also be required). The Court will allow the funds to be deposited into a blocked account from a probate matter; however, if there is ever a request to withdraw funds from the blocked account, a Petition under Probate Code §3410 et seq. will need to be filed in a separate case file for the minor or a guardianship of the estate of the minor must be established. Need Order to Deposit Money into Blocked Account or Petition for Guardianship of the Estate of Jordan O'Neal.</p> <p>Note: A Status hearing will be set as follows:</p> <ul style="list-style-type: none"> Friday, January 17, 2014 at 9:00am in Dept. 303 for filing the Receipt of Funds into Blocked Account or Petition for Guardianship of the Estate <p>Notes: Commentary under CUTMA (§ 3906) states that the amount of property transferred (as measured by its value) must be of such relatively small amount (\$10,000 or less in value) that the lack of Court supervision and the typically stricter investment standards that would apply to a guardianship will not be important. <u>In this case, the minor beneficiary's share is \$202,676.24 (plus \$513,488.89 from his father's estate).</u> Additionally, PrC § 3906(a) states that a personal representative may make a transfer <u>to another adult</u> or trust company as custodian for the benefit of a minor. Petitioner is requesting to transfer the funds to herself as Custodian.</p>
Cont. from		Accounting - \$886,520.51	
Aff.Sub.Wit.		Beginning POH - \$868,011.83	
Verified		Ending POH - \$689,323.53	
Inventory		(\$554,323.53 is cash)	
PTC		Adjusted Assets on Hand - \$714,323.53	
Not.Cred.		(takes into account the current fair market values of real properties to be used when determining and calculating the distribution of assets due to the fact that the beneficiaries have requested nonprorata distributions of Estate assets)	
Notice of Hrg		Administrator - \$20,185.41	
Aff.Mail		(statutory)	
Aff.Pub.		Attorney - \$20,185.41	
Sp.Ntc.		(statutory)	
Pers.Serv.		Attorney x/o - \$45,425.00	
Conf. Screen		(itemized by date for work related to special administration and bonding, the sale of real property, ancillary proceedings and sales of timeshares in Hawaii, issues with unrecorded Deeds of Trust, theft of personal property, tax issues, etc.)	
Letters		Costs - \$499.00	
Duties/Supp		(total costs = \$4,142.32, \$3643.32 has already been paid)	
Objections		Closing reserve - \$25,000.00	
Video Receipt		(to cover anticipated additional expenses for preparation of final fiduciary tax returns, miscellaneous expenses in transferring assets and other miscellaneous closing expenses; Petitioner also requests authorization to pay from the reserve any reasonable costs and expenses of the estate without further authorization of the Court and to distribute any remaining reserve in equal shares to the beneficiaries)	
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Continued on page 2

Petitioner states the following preliminary distributions have been made:

Erica Dorfmeier	-	\$2,500.00
David O'Neal	-	\$2,500.00

Distribution, pursuant to intestate succession, and agreement of the beneficiaries is to:

Erica Dorfmeier - \$85,176.24 cash, and real property on Menlo Avenue in Fresno (\$115,000.00), **for a total distribution of \$200,176.24**

David O'Neal - \$155,179.24 cash, real property in Auberry (\$45,000.00), **for a total distribution of \$200,176.24**

Jordan O'Neal - \$202,676.24 cash (to be distributed to Erica Dorfmeier as custodian under CUTMA (Probate Code § 3413(b))).

Petitioner states that this proposed distribution will equalize all beneficiaries and ensure that each beneficiary has received a 1/3 interest in the Estate, taking into account all prior distributions.

Atty Armo, Lance E.

Atty Gromis, David Paul

Atty Motsenbocker, Gary L

Petition for Payment of Attorney's Fees and Payment for Trustee's Fees

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>This matter was rescheduled for 1-16-14 pursuant to Minute Order 12-9-13.</p>
DOD:		
Cont. from		
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<input type="checkbox"/>	Letters	
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<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
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<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 12-16-13
		Updates:
		Recommendation:
		File 5 – Balagno

**Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
1820, 1821, 2680-2682)**

Age: 84		<u>TEMPORARY DENIED 11/18/2013</u>	NEEDS/PROBLEMS/COMMENTS:	
		<u>GENERAL HEARING 12/19/2013</u>		
Cont. from		<p>SHELIA STEARNS, daughter, is petitioner and requests appointment as Conservator of the Person, with medical consent, dementia powers, to administer dementia medications and for placement in a secured perimeter facility. Petitioner also requests appointment as Conservator of the Estate with bond fixed at \$50,000.00 and \$425,000.00 to be held in a blocked account.</p> <p>Declaration of Agustin Rubio, M.D.</p> <p>Estimated value of estate: Personal property: \$ 475,000.00 Annual income: \$ 10,000.00 Cost of recovery: \$ 48,500.00 Total bond: \$ 533,500.00</p> <p>Petitioner states: proposed conservatee is unable to take care of her needs for food, clothing and shelter. She requires care on a daily basis and has had police and adult protective service visit her on several occasions, each of which has encouraged the appointment of a conservatorship, which the proposed conservatee has been uncooperative. The proposed conservatee has been diagnosed with symptoms of dementia and Alzheimer's but refuses to cooperate in the care or treatment of her condition. Without assistance of a conservator, she runs the risk of serious harm to her person.</p> <p align="center"><u>Please see additional page</u></p>	<p>Court Investigator Advised Rights on 12/06/2013.</p> <p>1. Petition requests powers under Probate Code §2590 however it does not include attachment 1(d) stating what 2590 powers are requested and why they are needed. Local Rule 7.15.2 states it is the policy of the court to grant a guardian or conservator only those independent powers necessary in each case to administer the estate. A request for all powers described in Probate Code § 2591 will not be granted by the court. Each independent power requested must be justified by, and narrowly tailored to the specific circumstances of that case. Any powers so granted must be specified in the order and in the Letters of Guardianship or Conservatorship.</p> <p align="center"><u>Please see additional page</u></p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
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Reviewed by: LV

Reviewed on: 12/16/2013

Updates:

Recommendation:

File 6 – Cook

Court Investigator Jennifer Young's report filed 12/12/2013.

Needs/Problems/Comments cont.

2. Capacity Declaration does not support placement in a secured locked facility as it is stated that the proposed conservatee has capacity to give informed consent to this placement.
3. Capacity Declaration states that the proposed conservatee needs or would benefit from the psychotropic medication Aricept however does not address whether the proposed conservatee has the capacity to administer the medication.
4. Need Video Receipt for conservator pursuant to Local Rule 7.15.8(A).
5. Need Citation.
6. Need proof of personal service of the Notice of Hearing and a copy of the Petition on the proposed conservatee.

DOD: 09/10/2013		<p>DELMAN E. HOWARD, surviving spouse, is petitioner.</p> <p>No other proceedings</p> <p>Decedent died intestate.</p> <p>Petitioner states he is the surviving spouse of the decedent. Petitioner is a party to that certain Grand Deed executed on the 18th of May, 2006, recorded as Document Number 2006-011068, in the County of Fresno, concerning the parcel of real property bearing County of Fresno, State of California, APN 456-282-13 (hereinafter said APN shall be referred to as "Realty" and said Document Number 2006-011068 shall be referred to as "Deed"). Said Realty identified in said Deed was transferred from the Decedent and the Petitioner to the Decedent as her sole and separate property for financing purposes only. It was the intent of the decedent to transfer the Realty back to the Decedent and the Petitioner as their community property after financing was obtained. Decedent failed to execute a deed to transfer the Realty back to the Decedent and the Petitioner prior to her death.</p> <p>Petitioner alleges that the Realty is the community property of the Petitioner and the Decedent and that he is entitled to 100% of the Realty under California Probate Code §6401(a).</p> <p style="text-align: center;"><u>Please see additional page</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. #5a(2) regarding issues of predeceased child was not answered.</p>
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/o		
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	Letters		
	Duties/Supp		
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	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: LV
Reviewed on: 12/16/2013
Updates:
Recommendation:
File 7 – Howard

In the alternative, the Decedent's mother, Mrs. John Ora Calhoun, has also disclaimed any interest she may have in the Realty under California Probate Code § 6401 (c)(1)(B), if any.

If the Realty is the separate property of the Decedent, then under California Probate Code § 6401 (c), petitioner said Mrs. John Ora Calhoun are the only heirs entitled to distribution of the estate Realty. Because said Mrs. John Ora Calhoun has disclaimed any interest in the realty under said California Probate Code § 6401 (c), then Petitioner is the sole heir entitled to the estate Realty under California Probate Code § 6401.

Decedent was not survived by any issue, by any other surviving parent, by siblings, or by the issue of any sibling. Accordingly, petitioner is the only person entitled to distribution under California Probate Code § 6401.

Disclaimer of Interest in the Estate of Rita M. Howard by John Ora Calhoun, mother of the decedent, disclaims any interest in real property situated at 1667 S. Plumas Street, Fresno, Cal, APN 465-282-13.

Probate Status Hearing Re: (1) Failure to File Inventory & Appraisal; (2) Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

DOD: 12/21/2005		<p>KAMLJIT K. ASHAT, surviving spouse, was appointed as Administrator with full IAEA authority and without bond on 2/10/2009.</p> <p>At the time of the filing of the Petition for Probate the estate was estimated to be \$2,761,000.00.</p> <p>The decedent died intestate survived by his spouse and three children, one of which is a minor.</p> <p>Inventory and appraisal was due July 2009.</p> <p>First account or a petition for final distribution was due April of 2010.</p> <p>Notice of Status Hearing was mailed to attorney William Cowin on 12/19/2012.</p> <p>Minute order dated 9/12/13 stated the Court imposes court sanctions to both Attorney William Corwin and Administrator in the amount of \$500 each.</p> <p>Status Report filed on 12/11/13 states Attorney Corwin has retained the services of Jill Spaulding to assist his office with the completion of the probate now that all litigation has been resolved.</p> <p>Steven Diebert completed the property appraisal in late November.</p> <p>Ms. Spaulding has recently completed the filings with the Franchise Tax Board. Ms. Spaulding informed Mr. Corwin that the Franchise Tax Board is now taking up to four months for completion.</p> <p>Accordingly, Mr. Corwin requests the Court continue this status hearing until sometime during the month of May 2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Inventory and Appraisal, and first account or petition for final distribution 2. Need payment of sanctions in the sum of \$500 for Mr. Corwin and \$500 for Ms. Ashat.
Cont. from 022213, 032213, 051013, 053113, 071913, 081613, 091213, 101713			
Aff.Sub.Wit.			
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Notice of Hrg			
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Duties/Supp			
Objections			
Video Receipt			
CI Report			
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Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 12/17/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - Ashat</p>	

DOD: 09/01/13		NANCY QUEMADA LAU , daughter, was appointed Conservator of the Person and Estate without bond on 05/10/12. Letters were issued on 05/31/12.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 091613, 102113		Inventory & Appraisal filed 09/10/12 - \$481,000.00	<u>OFF CALENDAR</u> First & Final Account filed 12/10/13 and set for hearing on 01/28/14
Aff.Sub.Wit.		Minute Order from 05/10/12 set this matter for status regarding filing of the First Account and Report of Conservator.	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
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Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
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Status Rpt			
UCCJEA		Reviewed by: JF	
Citation		Reviewed on: 12/16/13	
FTB Notice		Updates:	
		Recommendation:	
		File 9 - Quemada	

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 06/20/2013	JOSEPH CONNELLY , is petitioner and requests appointment as Executor without bond.		NEEDS/PROBLEMS/COMMENTS:
			Amended Petition filed on 12/17/2013. Hearing is set for 02/06/2014
Cont. from 103113	Full IAEA - ?		Minute Order of 10/31/2013: Examiner notes are provided to the Petitioner. The Petitioner is directed to file an amended petition.
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate		
<input checked="" type="checkbox"/> Verified	Residence: Fresno Publication: Need		The following issues remain.
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			Petitioner's deficiencies include but are not limited to the following:
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>	Estimated value of the Estate:	1. The caption on the petition requests <i>Probate of Will and Letters Testamentary</i> however the petition states the decedent died intestate. If the decedent died without a will the petitioner should request Letters of Administration.
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>	Personal property - \$14,400.00	
<input type="checkbox"/> Aff.Pub.	<input checked="" type="checkbox"/>	Real property - \$300,000.00	2. Petitioner is not listed on #8 of the petition as required and it is unclear what the relationship is to the decedent.
<input type="checkbox"/> Sp.Ntc.		Total - \$314,000.00	
<input type="checkbox"/> Pers.Serv.		Probate Referee: Stephen Diebert	3. Need Affidavit of Publication.
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters	<input checked="" type="checkbox"/>		4. Need Duties & Liabilities of Personal Representative.
<input type="checkbox"/> Duties/Supp	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Objections			Reviewed by: LV
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			Reviewed on: 12/16/2013
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	<input checked="" type="checkbox"/>		Updates: 12/17/2013
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			Recommendation:
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			File 10 – Connelly
<input type="checkbox"/> FTB Notice			

5. Need Confidential Supplement to Duties & Liabilities of Personal Representative.
6. #5a(7) or 5a(8) of the Petition was not answered regarding issue of predeceased child.
7. Petition states the will waives bond however it is unclear whether the decedent died intestate. Need clarification.
8. Need Notice of Petition to Administer Estate.
9. Need proof of service of Notice of Petition to Administer Estate on the following:
 - Betty Connelly
 - William Connelly
 - Christine Connelly
 - Sandra Connelly
 - Francis Connelly
10. Need Letters.
11. Need Order.

Note: If the petition is granted status hearings will be set as follows:

- **Friday, 05/16/2014 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Friday, 02/20/2015 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 53		NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Pursuant to the Court Investigator's Report filed 12-11-13, the proposed Conservatee has returned to Los Angeles County, and the Petitioner herein, Evette Williams, intends to withdraw this petition. The request for reciprocal investigation from Los Angeles County Court Investigator's office was therefore withdrawn and no investigation has been conducted. <u>Therefore, Examiner Notes are not prepared for this hearing.</u> If this matter goes forward, an investigation will need to be completed, including advisement of rights, and Examiner Notes will be prepared prior to any further hearing.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		X
<input type="checkbox"/>	Aff.Mail		X
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		X
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		X
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		X
<input type="checkbox"/>	CI Report		X
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		X
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 12-16-13 Updates: Recommendation: File 11 – Blalock	

DOD: 09/14/13		<p>LINDA CROUCH, surviving spouse, is Petitioner, and requests appointment as Administrator without bond.</p> <p>Limited IAEA - OK</p> <p>Petitioner states that she is the sole heir and waives bond.</p> <p>Decedent died intestate.</p> <p>Residence: Clovis Publication: The Business Journal</p> <p>Estimated Value of the Estate: Real Property - \$9,000.00</p> <p>Probate Referee: RICK SMITH</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 12/05/13</p> <p>Note: Petitioner states that the only asset of the estate is real property that was held in joint tenancy until a reverse mortgage was taken out a few years ago, at which time the lender required the property be solely in the name of the decedent. Petitioner states that there are no other assets and that she is the sole beneficiary. As such she requests appointment without bond. It is noted that the decedent has 3 surviving children in addition to the surviving spouse who would be heirs of any separate property of the decedent. The court may require waivers of bond from the decedent's three children: Michael Crouch, Sharon Bahr & Catherine Jolley.</p>
Cont. from 120513			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 12/17/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 – Crouch</p>	

Petition for Appointment of Temporary Conservatorship of the Person and Estate

Age: 80		GENERAL HEARING 1-22-14	NEEDS/PROBLEMS/COMMENTS:	
		<p>DAVID WASHINGTON, Son, is Petitioner and requests appointment as Temporary Conservator of the Person with medical consent and dementia powers during the temporary conservatorship and as Temporary Conservator of the Estate with powers pursuant to Probate Code §2591 with bond of \$10,000.00.</p> <p>Two Capacity Declarations are filed.</p> <p>Estimated Value of Estate: Personal property: \$10,000.00</p> <p>Petitioner states the Proposed Conservatee has suffered a series of strokes and is unable to comprehend. She has been diagnosed with dementia and is unable to understand and make medical and financial decisions. The Proposed Conservatee's spouse recently died and she will inherit real property and cash from his estate. A conservator is necessary to manage her assets. Petitioner provides capacity declarations from two doctors.</p> <p>Court Investigator Dina Calvillo to advise rights, file report.</p>	<p>1. Petitioner is requesting additional powers during the temporary conservatorship; however, the petition does not indicate the necessity for the additional powers during the temporary stage. The Court may require clarification.</p> <p>Note: The petition at #6 does not request to change the conservatee's residence during the temporary conservatorship; however, dementia placement powers appear to be requested at this time pursuant to the attachments. The general petition states that the Proposed Conservatee does not like leaving her residence, but has no sense of safety and will wonder in traffic if unsupervised.</p> <p>However, it appears that three relatives reside with her at the address in Coalinga. If the Proposed Conservatee is to be removed from her home during the temporary stage, need information about the location she will be moved to. (The petitioner is not one of the relatives that resides with her.)</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>SEE ADDITIONAL PAGES</p> <p>Reviewed by: skc</p> <p>Reviewed on: 12-16-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Baker</p>	

Page 2

NEEDS/PROBLEMS/COMMENTS (Continued):

2. Petitioner requests powers under Probate Code §2591 during the temporary stage; however, the petition is not clear regarding the reason for the request. Further, pursuant to Local Rule 7.15.2, it is the policy of the Court to grant only those independent powers necessary to administer the estate. Need clarification as to the specific powers requested and why they are requested at the temporary stage.
3. Petitioner estimates the estate to contain \$10,000.00 in personal property, the nature of which is not specified, and requests bond of \$10,000.00. However, based on the request for additional independent powers under Probate Code §2591, the Court may require clarification as to the nature and value of the assets.

Further, pursuant to Probate Code §2620(c)(4) and Cal. Rules of Court 7.207, bond must include a cost of recovery. According to the estimate, bond should be \$11,000.00. (Petitioner's calculation at #5 is incorrect.)

4. Need Notice of Hearing.
5. Need proof of personal service of Notice of Hearing with a copy of the Temp Petition at least five Court days prior to the hearing pursuant to Probate Code §2250(e) on:
 - Essie Lavella Baker (Proposed Conservatee)
6. Need proof of service of Notice of Hearing with a copy of the Temp Petition at least five Court days prior to the hearing pursuant to Probate Code §2250(e) on all relatives:
 - Cindy Goff (daughter)
 - Jacqueline Washington (daughter)
 - Bobby D. Washington (son)
 - Terisa Washington (daughter)
 - Walter Borden (brother)
 - Edward Borden (brother)
 - Brandy Marie Jaramillo (grandchild)
 - Samantha Washington (grandchild)
 - Bobby Washington (grandchild)
 - Autumn Washington (grandchild)
 - Michelle Robin Washington (grandchild)
 - Serena Christine Marie Garica (grandchild)
 - Tabethia Pardoe (grandchild)
 - Bradford Peden, Jr. (grandchild)
 - Tonya Horn (grandchild)
 - Jennifer Peden (grandchild)

Note: Pursuant to Cal. Rules of Court 7.51, direct notice is required, even to minors and conservatees. Notice "C/O" another person does not constitute direct notice. If the person entitled to notice is a minor or conservatee, notice should be sent to that person directly, with a copy also sent to his or her parent or guardian or conservator.

14 Ariel Golden, Dallas Kerns, Dylan Kerns & Dwayne McCoy (GUARD/P)
Case No. 09CEPR00065
Atty Crawford, Angelita C. (pro per Guardian/maternal grandmother)
Atty English, Anita (pro per Petitioner/mother)
Petition for Visitation

Ariel age: 15	ANITA R. ENGLISH , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 12/9/13. Minute order states parties are ordered to participate in mediation today at 10:30 a.m. regarding visitation. The Court directs Mr. Fischer to provide the Court with a report regarding the status of the mediation. <u>Note:</u> Petitioner/mother Anita English has filed a petition to terminate the guardianship. The hearing is set for 12/30/13. 1. Need proof of service of the Notice of Hearing on: a. Danny Earl Golden (father) b. Charles Kerns (father) c. Ariel Golden (minor)
Dallas age: 9	ANGELITA CRAWFORD , maternal grandmother, was appointed guardian of Ariel on 4/22/2009 and was appointed guardian of Dallas, Dylan and Dwayne on 1/12/13.	
Dylan age: 8		
Dwayne age: 1		
Cont. from 120913	Father (of Ariel): DANNY EARL GOLDEN	
<input type="checkbox"/> Aff.Sub.Wit.	Father (of Dallas and Dylan): CHARLES KERNS	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Father (of Dwayne): DWAYNE McCOY - present in court on 12/9/13.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states she has not been allowed to talk to or see her children in five months. Her mother, guardian Angelita Crawford, is refusing to give her any contact.	
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	A copy of the Mediation agreement was filed by Anita English on 12/9/13.	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT Reviewed on: 12/17/13 Updates: Recommendation: File 14 – Golden, Kerns & McCoy

Petition for Appointment of Temporary Guardian of the Person

GENERAL HEARING 2-10-14		NEEDS/PROBLEMS/COMMENTS:
LORRE and STEVE WALLACE , Maternal Grandmother and Step-grandfather, are Petitioners.		Note re history: <ul style="list-style-type: none">• The minors reside with the parents in Selma, Fresno County, CA.• Petitioners reside in Quincy, Plumas County, CA.• Petitioners originally filed temporary and general petitions in Plumas County Superior Court on 6-27-13.• The father filed an objection and a petition to transfer the matter to Fresno County.• A Court Investigation was conducted by Plumas County Superior Court and filed 10-4-13.• On 10-29-13, the Court granted the petition to transfer the matter to Fresno County Superior Court. Fresno Superior Court received the transferred file on 12-9-13, and the Petitioners also filed new temporary and general petitions for guardianship on 12-9-13.
Aff.Sub.Wit.	Father: JOHN HANSEN Mother: ALLISON HANSEN	Note: Because the minors reside with the parents, further investigation may be referred to DSS pursuant to Probate Code §1513(b) in addition to investigation by a Fresno Superior Court Investigator.
✓ Verified	Paternal Grandfather: Unknown (believed deceased) Paternal Grandmother: Jeannette Hansen	1. Need Notice of Hearing.
Inventory	Maternal Grandfather: Earl Beever (deceased)	2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on the parents pursuant to Probate Code §2250(e).
PTC	Petitioners state request immediate guardianship to provide the children with a safe, loving, healthy, drug free environment, enroll them in school, help them to catch up to their grade levels.	
Not.Cred.	Petitioners reside in Plumas County. When they originally filed for guardianship there, the parents were constantly moving from place to place living in a motorhome in campsites, and they were unable to serve the mother.	
Notice of Hrg	When the father moved to transfer the matter to Fresno County, and was ordered to pay the transfer fees, Petitioners paid the fees because they believed he would not pay and delay the proceedings.	
Aff.Mail	Petitioners are concerned that the parents are abusing methamphetamine. Lorre Wallace states she and her daughter were always close, but in September 2013, Allison Hansen told her she could not talk to her anymore.	
Aff.Pub.	After a visit in June 2013, Petitioners are very worried about the children and had to do something to protect them. Petitioners asked to visit because the mother had been constantly asking for money in the preceding months.	
Sp.Ntc.		
Pers.Serv.		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		
<u>SEE ADDITIONAL PAGES</u>		

Page 2

Petitioners state sent money because they did not want the family to go without food, but once the requests became regular, they stopped sending money. They offered non-monetary support, but the parents always rejected their offers. Petitioners offered to let Allison and the children come live with them until John got back on his feet, but Allison only wanted money from them.

Petitioners stated they waited a week to visit, per Allison's request, and came to visit on June 16. When they arrived at the address that Allison had given her sister, they learned it was only a temporary residence. Allison appeared frail, pale, and malnourished. Allison appeared open to the idea of coming to stay with them, but did not think John would allow it. John was keeping the children at an undisclosed location. Petitioners later learned that John had threatened her and she was afraid to talk with them because John was monitoring her phone.

Petitioners have never been in this type of abuse situation before and sought help at the Marjaree Mason Center in Fresno. Allison did not accompany them. Late in the evening, John agreed to bring the children back to the house where she was staying at if she made sure that Petitioners were not present.

Petitioners state that while they were in Fresno, they spoke with a Teddy Donaldson, who informed them that the parents were on methamphetamine. Petitioners believe they have been using methamphetamines since 2011.

On June 18, they had not been able to see the children. Petitioners asked Allison if they should stay in Fresno or go back home. Allison informed them by text message that John would let them see the children at a different location. They arrived at a house in Clovis and saw the children. The children did not look healthy. Petitioners asked if they could take the children home to Quincy for a visit, but John refused. Allison could go, but the children could not.

Allison communicated by phone from June 19 through June 21. Petitioners continued to worry and with the assistance of the Marjaree Mason Center arranged a welfare check with the police. The police informed them that they told John Hansen that either he needed to leave, or Allison and the children needed to leave. Late in the evening, Allison told Petitioners that she had called the Marjaree Mason Center, but they told her they would do a drug test, so she was afraid the children would be taken into protective services. Petitioners begged her to let them help, but she refused. Petitioners have had limited contact with Allison since that date.

The children are being neglected, are malnourished and their educational needs are not being met. The children are being home schooled by their drug abusing parents. They are not receiving proper education and are behind grade level. Petitioners believe they have been reported to CPS on at least two occasions, but the social worker has been unable to locate the family due to their nomad lifestyle. The children desperately need and deserve help and Petitioners are willing to do whatever it takes to be there for them. Petitioners are requesting immediate guardianship and ask the Court to order hair follicle drug test before granting any visitation. Petitioners will pay for the tests.

Additional declarations are provided from Petitioner Steven Wallace and Amy Zingaretti, sister of Allison (maternal aunt of the minors).